PG Calc

BatchCalcs Service Client Data Form

DATE: _____

BATCH CALCS CLIENT DATA FORM

Please complete this form to provide PG Calc with the information needed to perform your *BatchCalcs* Service.

To submit form: Save completed form to a file, then email *info@pgcal.com* with the file attached.

IMPORTANT NOTES

- Please provide the data in Excel format file (*.xls or *.xlsx).
- Provide one column for each value.
- Dates should be in *mm/dd/yyyy* format.
- The sort order of the final file will be the same as in the original file sent to PG Calc.

CONTACT INFORMATION

First Name: _____

Last Name: _____

Organization: _____

Phone: _____

Email: _____

DATA FILE

Approximate total number of records expected in file(s): _____

Number of files ($100 fee for each file/tab after the first two): _____

Preferred method of file transfer:

Email attachment (PG Calc can encrypt attachment)

Post to my organization's FTP site

Use other secure method provided by my organization

Estimated date the data file will be delivered to PG Calc: _____

REQUIRED FIELDS SUPPLIED IN DATA FILE SENT TO PG CALC

ID #

Beneficiary birth date(s) in *mm/dd/yyyy* format

or

Beneficiary Age(s)

VALUES TO USE IN THE CALCULATIONS

Gift type (check all that apply):   Immediate gift annuity   Deferred gift annuity

Gift Amount: _____   *or*   Not the same for every record (will provide in file)

Gift Date: _____   Date of/Age at first payment (deferred gift annuities only): _____

IRS Discount Rate: Most recent   Highest for month of gift   Other: _____

Payment Frequency: Annual   Semiannual   Quarterly (typical)   Monthly

Annuity rate table: Current ACGA rates   Past ACGA rates (Year: _____)   Custom rates

If gift of appreciated asset (not cash):

Cost Basis: _____   *or*   Not the same for every record (will provide in file)

Donor/Annuitant Relationship: Donor(s) is/are Annuitant(s)   Donor(s) is/are NOT Annuitant(s)

BATCHCALC VALUES TO ADD TO EACH RECORD

Indicate the BatchCalcs values you want added to each record

   Round $ amounts to nearest $ (otherwise $ amounts will be shown to the penny)

Often requested:

   1-life calculations   2-life calculations   Both
   Charitable deduction
   Annuity rate (%)
   Annual payment amount ($)
   Beneficiary age(s) on birth date nearest gift date (requires birth date(s))
   Beneficiary ages on annuity starting date (deferred gift annuities only)
   Ordinary income portion of annuity
   Capital gain portion of annuity
   Tax-free portion of annuity
   # of years tax-free portion paid

Rarely requested:

   Total reportable capital gain
   # of years capital gain reported
   Donor's total capital gain in gift asset
   Exclusion ratio (portion of annuity that will be tax-free or capital gain income for many years)

ADDITIONAL SERVICES

Do you want us to create merged letters or Summary of Benefits illustrations for your mailing?

Yes (additional charges may apply)

No (skip remaining questions)

If **Yes**, you want PG Calc to (check all that apply)

Provide printer-ready merged Summary of Benefits illustrations in MS Word format

Help you draft the text of your letter

Provide printer-ready merged letters in MS Word format

Other   Describe: _____

If PG Calc will help you create a merged Summary of Benefits ILLUSTRATION:

Send us a sample Summary of Benefits illustration from Planned Giving Manager that shows the header and footer information you want, including logo or organization name, disclaimer, chart date, and "Prepared by" name.

ADDITIONAL FIELDS TO SUPPLY IN DATA FILE SENT TO PG CALC

Name(s) to print in chart heading

If PG Calc will help you create a merged LETTER:

Send us a sample letter in MS Word format. Please highlight in bold all variable text (address, BatchCalcs values, etc.).

Date of letter _____

ADDITIONAL FIELDS TO SUPPLY IN DATA FILE SENT TO PGCALC

Salutation

Name

Name #2 (spouse/partner)

Name(s) to use with address

Address (Line 1, Line 2, Line 3 (optional), City, State, Zip, Country (optional))

To submit form:

▸ Save the completed form to a file, then email *info@pgcalc.com* with the file attached.

Have questions about BatchCalcs?

▸ Contact PG Calc to discuss your particular concerns and the scope of what you want included in your report.

888-497-4970   www.pgcalc.com   info@pgcalc.com